

Communities of Opportunity Retreat

Meeting Summary

Members Present: Scarlett Aldebot-Green, Michael Brown, Deanna Dawson, David Fleming, Ubax Gardheere, Betsy Jones, Gordon McHenry, Jr, Adrienne Quinn (May 12 only), Sili Savusa, Adam Taylor, Tony To, Michael Woo

Guests Present: Marguerite Ro (May 12 only)

Staff Present: Sharon Bogan, Nadine Chan, Alice Ito, Cheryl Markham, AJ McClure, Aaron Robertson, Holly Rohr Tran, Kirsten Wyse

Facilitator: Jennifer Martin (Community Change Group)

Thursday, May 12, 2016

Welcome and Retreat Overview

Betsy Jones (King County) welcomed the group and thanked attendees for committing 2 days to focus on Communities of Opportunity (COO).

Retreat Goals were identified as:

- Review and celebrate where we have been, where we are and where we are going
- Explore the COO Theory of Change and Strategies
- Clarify the purpose of COO's Learning Community, develop initial strategies and next steps
- Update on COO evaluation metrics and reporting
- Identify next steps for a COO five-year implementation plan

Michael Brown (Seattle Foundation) also welcomed the group and noted that COO is at a critical juncture, and should work collaboratively and collectively to find solutions for COO and the communities it's working to support. It's important for the Interim Governance Group (IGG) to discuss our game plan for next 5 years at this retreat.

Key introductions included:

- Jennifer Martin (Community Change Group) was welcomed and introduced as the facilitator for the retreat; Jennifer (at that time working at Seattle Foundation) was instrumental during the founding period of the COO initiative.
- Marguerite Ro (Public Health-Seattle & King County) was introduced as a guest and it was noted that she brings on the ground expertise around learning communities and communities of practice which can inform the COO Learning Community.

Jennifer Martin reviewed retreat logistics and agreements, pointed out posters including past visioning work done by the IGG, e.g. “Seattle Times Headlines,” and oriented attendees to the retreat agenda. Tony To led the group through a review of the Governance Grounding poster.

Retreat attendees did a round of introductions and talked about the object they brought to represent the strengths they bring to the COO initiative.

Celebrating Where We’ve Been & What We’ve Done

The group reviewed and contributed to a timeline noting key milestones for COO.

IGG members noted some of the things they are most proud of:

- COO paid stipends to participants coming from smaller organizations.
- Co-Design process: coming up with solutions together.
- Community engagement: having community at the table all along the way is revolutionary!
- Seattle Foundation’s approval: trusted group to launch initiative without knowing exactly how it would go.
- Community leads’ involvement (Sili and Tony did introductions) in Policy/Systems grants info sessions for (1st round).
- Data workgroup – collective work around displacement data. Group brought both knowledge and resources.
- Process equity – capacity-building awards.
- Regional space for pushing racial equity agenda. These conversations are now easier to have.
- Using data to inform decision-making is really important.
- HUD Secretary Award.
- Founding institutions brought trusted community partners in during the beginning stages.
- Conversations throughout King County government are shifting to community-driven, -owned and -led decisions.
- Trust and partnership between community groups and Seattle Foundation and King County. (e.g., White Center refers other funders to Seattle Foundation).
- Ability of [Interim] Governance Group to amplify community voice. Collective impact can be messy and time-consuming, but it changes the conversation in other arenas.

Exploring COO Working Theory of Change + Strategies

Jennifer introduced the working draft of the COO Theory of Change (TOC).

The group’s resulting discussion included:

- Outcomes are focused on all of King County, disaggregated by race and place. The Implementation Plan will address spread and sustainability
- Under “why place”: These are statements of starting conditions. We need to articulate the approaches that we believe will get us to desired outcomes, e.g. how the change is going to happen.

- How do the strategies/indicators relate to Best Starts for Kids?
- Opportunity to lift up Policy/Systems work regionally.
- Question of how and to what budget is allocated.
- Education and housing strategies lift up access.
- Work to make change sustainable, beyond funding term.

Attendees split into 4 groups to review Strategy areas (Health, Housing, Economy and Community Connectedness) and noted questions raised and ideas for leverage, partners and resources. See attached Strategies tables.

COO Strategies: Key Themes/Things to Address

The group reviewed key themes heard during the COO Strategy area activity (before lunch) and noted items that needed to be addressed:

- Leverage policy/systems and other partnerships to get to the hoped-for outcomes. COO is a catalyst and it extends/expands beyond the partnerships and resources of the IGG members – need to determine how to operationalize that.
- What are we doing long-term to avoid future problems – think broader and learn from current experiences like what’s happening with displacement in Seattle and other areas. How can we focus in the areas and neighborhoods where we know things like gentrification will happen and plan accordingly?
- How can we elevate community voice around future development?
- The more we move into the strategies (in the four corners) the more siloed things get – how do we connect them coherently? And what’s the sustainability post-five years?
- We need to describe our “what”, the “how”, and the “when” – our theory of change and the practice (how we are doing things differently). All of this takes time.
- There is a leap of faith between what our investments are and the outcomes we’re trying to achieve – we need to better articulate how we’re getting from what we’re doing to actually moving the needle. We need to consistently communicate that. For instance, can there be “testing” in our sites that is then influencing policy/systems change efforts – a way to then scale beyond the three sites that benefit all the “red” areas of the map? We need to be clear on how we are making “catalytic change.”
- Change takes a long time – we need patience – and also think about the future possible trends and be prepared to address them.
- Yet, we need to be bold enough re: scale and scope – we have a huge goal we’re pursuing. Do our strategies match that goal? How do we push ourselves and what are we doing that is different than what’s been done in the past (because what’s been done in the past isn’t working)? Look at our implementation and amplification approach.
- Our current investments in just three communities do not match our goals – how do we do more with limited resources? What will

This work is meant to be catalytic –if we are successful, the need for COO as a body of work will go away. Government and philanthropy will transform to become like us – it will be the dominant system and culture.
-IGG member

make COO different and catalytic – what are the roles of leadership development and learning community?

- “COO is not a regular grants program” – what is our role as a catalyst, communicator and convener?
- What’s our definition of “community”?
- How can we leverage all our resources from throughout the region (not just the resources we currently have through IGG – larger corporations for example who will need the community pressure to contribute potentially)? How do we leverage the local assets and resources? The community needs to own it and believe it in order to really move it forward.
- We need faith that this work is the right work and will lead to our outcomes, and we need to articulate better how we’re approaching the work and how we think it will create change. We need to articulate it so we know what we’re going to do for other “red” communities who aren’t currently getting direct investments.
- How effective is it to have 4 strategy areas?
- Community voices identify jobs, health and safety as main needs.
- We need to create new processes – i.e., food innovation network is an approach for authentically engaging community about something that is important to them and for lifting up what is required for bigger changes. We need to identify the successes and share the learnings. This could lead to undoing policies that generate undesirable outcomes.
- What is the COO infrastructure and capacity to do this catalytic work? This group needs to be opportunistic with resources to make the “magical moment” happen.
- Community must own the solution and strategy – what does “ownership” mean? – both tangible asset ownership but also ownership of the process.
- What is COO’s geographic area of focus? It’s not just the places where we currently have investments. How can we amplify the work so we change all the “red” areas of the map?
- How does COO connect in with BSK?
- How do we keep this sustained or what is the way to think about sustainability? What can we learn from other place-based initiatives re: sustainability?
- How can we create on-the-ground demand for opportunities (not just about \$) that will inspire politicians, corporations, etc. to work together?

Theory of Change

The group returned to discussing an overall Theory of Change for COO. It was noted that it’s been easy to get fixated on place, but that the COO vision is for *“All children, youth, adults, and communities in King County.”*

A sketch was proposed as a COO framework. The graphic shows how COO starts with community (place-based) to identify needs and issues, which inform policies, systems and practices which in turn impact communities in the region.

Additional points demonstrated by this framework:

- It was noted that a change in a policy, system or practice originating from one place can flow “up” to affect regional change (example of unemployed workers that created local solution, now flowing to other zip codes).
- Place-based and policy/systems grantees are a part of the larger learning community.
- COO will continue to invest in place-based community partnerships along a continuum of need to catalyze change.
- Coalitions/community partnerships will be in various stages of development; COO should be one resource among many others that is brought to bear to aid in further development of the community.
- Need to ensure community input on COO policy changes.
- Operationalizing policy and systems changes in local communities can be a role that COO can play.
- Community can be defined geographically or by group affiliation.
- COO is about equity (not parity).

All IGG members present affirmed the “Agreed Framework” visual concept as capturing the COO essence.

Next steps include staff drafting up a proposed theory of change graphic based on this framework for IGG to review and adopt.

Current COO Investments: Strategies and Early Wins

SeaTac/Tukwila

Adam Taylor shared some highlights about the SeaTac/Tukwila Food Innovation Network (FIN) including accomplishments, challenges and policy and systems change topics to address. A recent feasibility study identified a need for a commercial kitchen in the area; a rental space has been found as a short-term solution, with hopes to build a kitchen at the YMCA as a long-term solution.

In addition, possible future COO expansion areas have been identified, including: Workforce Development, leadership and civic engagement, health systems strengthening, and housing.

White Center

Sili Savusa noted that one of COO’s White Center legacies is the capacity to collect their own data. This has been liberating for families, staff and leaders of the White Center area as they use the local data to tell the story of their own community and helps leaders streamline strategies and work. See White Center [infographic](#) and report. Leaders plan to collect data

This map shows the inequities that current policies and systems have built up over years. We are barely into our work of implementing some small and big changes. Let’s have faith in what we’ve started; trust the process. The status quo is not working – it’s failing the people who have the least amount of power and capacity. Small victories do count and accrue to the larger good.
-IGG member

every couple years in order to reflect current needs, help inform strategies and to see if and how work is making a difference.

Rainier Valley

Tony To noted that the Rainier Valley COO (RV) team consists of 4 coalitions, which together have more than 30 community organizations members focused on various areas including advocacy, community development, cultural development, etc. The Rainier Beach neighborhood plan (nearing approval by the City) is an example of COO success. In the last two years, the Rainier Valley team has been able to leverage COO resources \$3 to \$1.

Tony also noted some challenges, including working amongst complex interests and cultures. As the RV site moves from planning and co-design to implementation, the desire is to deepen engagement in decision-making beyond the leadership level of coalitions. RV is looking at expanding into the new area of workforce development through a contract with the City of Seattle.

Ubox Gardheere noted the power of community connection and organizing people to influence policy outcomes such as preservation of affordable housing and development of new housing and mixed-income housing and decisions around the Graham Street Station (Sound Transit 3) timeline. The RV community has been engaged in the development of the neighborhood Comprehensive Plan for past 2.5 years; community organizations and residents have been involved since the beginning and they are now seeing some early equity wins.

Policy and Systems Grants

Aaron Robertson highlighted some policy and systems (p/s) investments that COO has made. The first round of p/s funding was the first time for Seattle Foundation and King County to do decision-making with the community. The 92 proposals received in response to the first round of p/s funding provided a sort of “lay-of-the land.”

Capacity-building grants were a mid-process pivot during that first decision process. Four of these 12 grantees have already received additional funding after their capacity-building grants.

Additional p/s grants were aligned with the Results Based Accountability COO framework and what we’re hearing on the ground from community partners.

COO “early wins” summary

Sharon Bogan presented a draft summary of COO early wins, noting that this gets to “what” rather than the “how” of COO. These demonstrate some of the ways that COO is starting to change our region and may be useful in “building faith” in the COO process. As this group discussed, many of the things COO is trying to accomplish will take time to do; perhaps some of the examples in this document can be used to show that change is starting to happen and more time should be allowed for it to play out.

IGG members are invited to send any suggested edits, revisions or additions to Sharon.

Friday, May 13, 2016

Welcome Back

The group reviewed some of the previous day's work and IGG members responded to this COO Learning Community opportunity statement – **What kind of learning community might we create that helps the region to succeed in achieving the bold results (RBA framework)?**:

- Related to COO's focus on place-based work: when displacement happens, folks become un-placed and dispersed, which can have a debilitating effect in terms of voice and whether you're perceived as important (or not).
- How will COO reach all the "red" areas of the map that are not currently funded by COO? How are we telling the story of equity as we look at this suburbanization of poverty? This is the frame for the learning community and we must balance between the use of limited resources to prepare people to do a style and body of work (trickle-down organizing) and between community-led change.
 - It was noted that the level of frustration around this in southern suburbs is growing.
- Need to intentionally knit together COO's place-based and policy/systems work.
- Incorporate faith-based communities (many of these groups have long been attuned to social justice imperatives that COO is addressing).
- The learning community provides a place for communities to come together and learn from each other and benefit the whole region. Don't get hung up on the "Communities" (e.g. place-based sites) of COO; remember and remind others that COO is focused on all the "red" areas of the region.
- Consider whether the Seattle Foundation's Neighbor-to-Neighbor grantees can be woven into COO learning community

Learning Community

National learnings

Cheryl Markham noted while there is not a large evidence base for the type of work that COO is planning to do with their learning community, a recent study conducted by Mt. Auburn Associates, Inc. provides some national examples and lessons learned about learning communities. Findings from the working paper *Best Practices in the Design and Implementation of Learning Communities* (<http://www.frbsf.org/community-development/files/wp2016-01.pdf>) were summarized on posters. Retreat attendees were asked to place dots on the findings that resonated the most with them. The findings receiving most dots included:

- Additional supports can accelerate and deepen the work – *i.e. coaching for communities/team leads; small grants for experimentation or to follow up on an area explored in the convening; research & data support; rapid just-in-time TA for participants as specific issues surface at convening, or teams can bring specific problems they need help on at convening.*

- Intentional design and clarity about the goals and intended outcomes of the learning community are critical to success – *i.e. Building cross-sector teams in region, learning across teams or across leaders with similar work, catalyze innovative solutions to complex problems, set bold regional goals.*
- A skilled coordinator/coordination team is required to oversee design, keep participants connected, incorporate feedback & provide glue between sponsor & participants
- Evaluation should consider changes in individuals, in groups, and in communities. *Assessing whether the learning communities achieved the interim outcomes, such as strengthening collaborative teams, promoting successful peer learning, sparking innovative solutions, and building field knowledge, cannot be understood through surveys used to assess reactions to specific convenings. The larger question is whether or not the interventions have contributed to sustainable changes among the participants, the organizations within which they work, and the communities in which they are located. To assess both the interim outcomes and long-term impact requires a more formal evaluation framework and methodology.*

Discussion afterwards included:

- This article talked about learning community as a “meeting,” but we see this work as a movement, not just a meeting.
- Do we need to change the language/how we talk about learning community to bring clarity?
- Need to be clear about 1) what we want to get out of the learning community, and 2) it will be iterative because we want to learn from what we’re doing.
- Learning community design is based/iterating on work done with Living Cities’ Integration Initiative.

Retreat attendees participated in a creative design activity about the COO learning community using Smallify principles (reframe challenges into smaller more manageable portions).

Next steps and considerations for learning community

Need to identify/clarify statement of purpose, top elements/strategies of learning community and who is involved in the learning community.

Additional considerations include:

- Need to be inspirational and less top-down, more bottom up.
- Define how learning community connects to/interacts with the work done already on 4 strategy areas.
- Maintain framework of a specified number of strategies. We can be serious about changing a system unless we know what the boundaries are and we have strong feedback mechanism.
- Make sure convenings are inclusive and expand into private sector.
- Establish clear and common language so that newcomers can understand COO concepts.
- Build “on-ramps” for bringing new groups in.
- Clarify geographic boundaries for learning community participation.

- Design cohorts based on the optimal groups to achieve sought change (lay pathway for more policy and system change).
- May be different levels of engagement in learning community (e.g. attend periodic convenings only, etc.)
- Message “we’re all better off when we’re all better off.”
- Folks in need also live in “blue” areas (red areas appear red because of the proportion of residents in need).
- Learn from and apply what’s going well in “blue” areas; aside from wealth, there are things happening (smart planning, etc.) that contribute to successful system outcomes.

Working lunch continued discussion on Learning Community and addressed these questions:

- 1) What is the Purpose? *To build a movement to reach a state of equity for the region*
- 2) What are some key strategies? *Timeframe with benchmarks (on ramps, off ramps, peer-to-peer learning, cohorts) and Guided by impacted communities (\$, early work, community data)*
- 3) Who participates? *Those working on shared priorities and Employers who may influence housing, transportation, health, policy, etc.*

Measuring Progress

Nadine Chan (Public Health-Seattle & King County) discussed the role of data and evaluation as showing what COO is doing and how these actions are disrupting root causes in order to see the change called for in the COO vision.

COO is using a multi-level evaluation approach. IGG members were asked to consider:

- At what levels has COO done a lot of work?
- Which COO strategies have the most potential for community-wide impact?
- What other opportunities should COO explore to achieve community-wide impact?

COO Dashboard

IGG members also reviewed a draft proposed COO results dashboard developed out of work done by the COO Data Workgroup.

Measures of progress for social/economic policy level changes include asking:

- What changes took place?
- How many people were (potentially) impacted?
- Did it make a difference for anyone?

Source: A user’s guide to advocacy evaluation planning, <http://www.hfrp.org/evaluation/publications-resources/a-user-s-guide-to-advocacy-evaluation-planning>

IGG was asked:

1. What info would IGG like to know about whether COO is making progress?
2. What would you need to know about whether we’re being strategic in our work?

Examples:

- Is the COO effort building capacity for the disruption needed to address root causes?
 - Have we been nimble?
 - Have we attracted new donors? New advocates? New champions?
 - Look at the COO timeline we created during this retreat for examples
- Is the effort changing awareness, attitudes, public will, political will?
 - Several examples came up during the retreat

Discussion included:

- Know that the outcomes we're trying to achieve will take time – will be asked before outcomes have a chance to run, to be accountable. Need to select some short and mid-term indicators to keep us on track/keep up our credibility. Draw out the logic that shows we're on the path to success. Make it clear enough for us to understand and to communicate to others.
- If we don't have these indicators figured out now, when do we expect to have them?
- As we do evaluation, let's be thoughtful about other work that is going on, so as needle moves, important that we can distinguish and not take credit for other folks' work. Can we zoom in and be specific about how COO work as helped change indicators?

Logic model

Nadine noted that sites have done some thinking about strategies and how to measure; this is about picking the right comparison so that we can tell our story well. **Logic model** could look one of 2 ways:

- A. 3 buckets: known, unknown (emerging) and cross-cutting, or
- B. ~5 strategy areas that we are interested in investing in
 1. Build on work done in past year? Or
 2. Hold space for a couple more that are important even though we don't have any work going on there right now?

Discussion included:

- A couple attendees noted a preference for option B; noting that the strategies COO is working on now are not broad and deep enough to get us to the bold outcomes we're reaching for.
- Overselling is a risk.
- Quantitative framework seems adequate; add in more qualitative over the next year or so.
- Be clear about what COO staff and funded activities are working on and what is the IGG's role.
- COO is about fundamentally doing business differently. Think about how are we doing that, and how can we measure that.
- Could design an evaluation that is time-bound.
- Consider the fact that other learning organizations devote 10% of resources toward evaluation; we will likely need to increase COO evaluation resource allocations.

Next steps

- Work with COO partners and policy grantees to update COO strategies table with estimates of potential # people reached.
- Data team will update COO logic model for IGG.
- IGG will analyze logic model and current strategies for bold ways to maximize ability to achieve community-wide change.
- Communicate clearly what we will be doing evaluation and manage expectations.

COO Implementation: 5-year plan development

Update on BSK/COO implementation plan

The COO implementation plan related to Best Starts for Kids (BSK) investments will be transmitted to the Metropolitan King County Council in June. Revisions based on discussions at this retreat will be incorporated. Staff will keep IGG members informed of important hearing dates.

The COO/BSK implementation plan will be incorporated into the overall COO 5-year plan.

Next Steps

Retreat attendees discussed what needs to happen in the near future to set IGG up for developing 5-year plan with budget and evaluation plan by the end of 2016. An initial draft was developed:

May/June 2016	Q3 2016	Q4 2016	2017
IGG Meetings			
June 17	July 15	Oct. 21	TBD (Bi-monthly meetings?)
	Aug. 19	Nov. 18	
	Sept. 16	Dec. 23	
Overall Initiative Management (includes governance, staffing and structure)			
Bring IGG members who couldn't attend retreat up to speed.	<p>DEEP DIVE NEEDED:</p> <ul style="list-style-type: none">• When to launch learning community convening? And early work before• Establish link between policy/systems & place-based; plan for adding in learning community• Define what we mean by "Community"• ID potential partners – leverage strategy, proactive outreach of who else we need? <p>More thought on interim measures, evaluation plan and strategy areas</p> <ul style="list-style-type: none">• Refine "Framework" (Theory of Change) and description of how we are approaching the work and how we think it will achieve the outcomes• Need to ID the criteria and process for selecting place-based investments	Finalize a <u>five-year plan</u> for COO that incorporates the BSK implementation plan (inc. eval plan & budget)	Move from IGG to GG (check requirements in legislation)

May/June 2016	Q3 2016	Q4 2016	2017
	<ul style="list-style-type: none">• Evaluation:<ul style="list-style-type: none">○ COO logic model with estimated reach based on what we know now○ Review, reflect and provide input on strategic next steps		
		Schedule 2017 IGG meetings	Link policy priorities with a win in 2017
Identify structure and capacity of COO to get work done (think about community needs)			
Planning and Evaluation (TOC/Framework, Evaluation Plan/RBA, etc.)			
	Finalize how we will measure & track our progress & review regular updates @ IGG	COO Eval plan include with: <ul style="list-style-type: none">• BSK Eval plan• five-year plan noted above	
	Specify what improvements COO will focus on (IGG and COO partners) for best shot at community-wide improvement		
Learning Community + Partnerships			
Staff will take the LC notes & bring back to IGG @ 6/17 meeting.	Convene IGG subcommittee to work on Learning Community and theory of change	Community engagement strategy leading up to the 1 st convening	Calendar of activities for 2017
			First large convening (latter half of 2017)
COO Investments (place-based and systems grants, T.A., etc.)			
Decide 2016 funding – when does that get renewed? (sync fiscal years?)		All 3 sites move to implementation	
Marketing and Communications			
Input on “early wins” needed from IGG	Marketing & Communications plan: <ul style="list-style-type: none">• one-pager• community strategy• infographic• early wins document	Publish & share COO infographic with key messages (part of communication strategy)	
Regular updates to IGG on progress and 3 sites updates	Quarterly blog posts		

May/June 2016	Q3 2016	Q4 2016	2017
Funder Reporting (Living Cities, BSK, Seattle Foundation, etc.)			
	Living Cities Learning Community, Sept. 27-28, in D.C.	Capital Plan (related to implementation plan) Leverage other tools/capital beyond BSK	

Closing

Meeting survey link will be circulated via email.

The group affirmed that the retreat goals were met and expressed appreciation for the time together to work on Communities of Opportunity.